



**LEAH CHANG  
LEARNING**



<https://www.youtube.com/watch?v=hnEQq7kNFWo>

“CRM: It’s not a tactic, it’s a strategy.”

**Turn the “Corporate speak” into “Non-profit speak”!**

Business \_\_\_\_\_  
More profitable \_\_\_\_\_  
Employees \_\_\_\_\_  
Sales \_\_\_\_\_  
Sales pipeline \_\_\_\_\_  
Customer \_\_\_\_\_  
Profits \_\_\_\_\_  
Customer Relationship  
Management \_\_\_\_\_  
Leads \_\_\_\_\_

Money \_\_\_\_\_  
Company \_\_\_\_\_  
Customer lifecycle \_\_\_\_\_  
Retention \_\_\_\_\_  
Acquisition \_\_\_\_\_  
Paying customers \_\_\_\_\_  
Loyal customer base \_\_\_\_\_  
Customer experience \_\_\_\_\_  
Customer satisfaction \_\_\_\_\_

**5 CRM Benefits**

Sales team \_\_\_\_\_  
Web-to-lead forms \_\_\_\_\_  
Sales person \_\_\_\_\_  
Customer interactions \_\_\_\_\_

Potential Customers \_\_\_\_\_  
Sales “close offline” \_\_\_\_\_  
Close more “deals” \_\_\_\_\_

*Notes:*

Business relationships \_\_\_\_\_  
Business practices \_\_\_\_\_  
Business processes \_\_\_\_\_

Automatic Workflow Rules \_\_\_\_\_